Decision Center Training Manual

PrairieCat website:  http://support.prairiecat.info/

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**Decision Center Overview**

Decision Center is a comprehensive collection management solution that provides timely and focused action recommendations for budgeting, selection, weeding, floating, shelving allocation, and more. It helps libraries match supply and demand to deliver optimized service. By accessing current and complete data – including circulation, holds, transits, patrons, and acquisitions – Decision Center provides courses of action that help your library create customer driven collections while streamlining collection management workflows.

Decision Center is web-based user friendly reporting software that allows library staff to analyze circulation and collection costs and trends without requiring you to perform complex Boolean queries in advance. There are many pre-defined queries in Decision Center; we will only be demonstrating and practicing some of these in training, but encourage users to explore all of the possible reports on your own. For a list of definitions on the different search parameters, please see the definitions section at the end of this handout. Some other general Decision Center details:

- Most reports in Decision Center provide statistics or collection costs and trends only; some weeding reports allow you to export a list of records from search results.
- Decisions Center includes data up to the end-of-business from the previous day.
- Acquisitions reports (in the Evaluation section) are only available to libraries that use the Acquisitions module in Sierra.
- Your reports are not currently saved in Decisions Center; you can only save report results if you output data to Excel and save; you will need to recreate your report each time you use Decisions Center. The ability to save report templates is in development for Decision Center and Fully Participating libraries will have that ability in the future.

Decision Center is hosted for PrairieCat by Innovative. You can access Decision Center at: [http://dc-prcat.iii.com/iii/dc-prcat/](http://dc-prcat.iii.com/iii/dc-prcat/)

Your Login and Password:

Login:  dcprcatXX (xx=your library’s accounting/serials unit, e.g. dcprcat43) (please see the separate list of PrairieCat fully participating libraries and their assigned accounting unit number).

Password:  prcatxx (xx=your library’s accounting/serials unit, e.g., prcat43)
The login and password for non-Fully Participating libraries is dcprcat74, password prcat74.

On the Decision Center homepage, you will see that reports are organized in four modules: Evaluation, Development, Balancing and Maintenance.

**Evaluation**
The Evaluation module contains descriptive reports about what has happened in your library or library system. Evaluation reports provide specific information regarding various aspects of library operations and analyze operational trends over time. Reports appear in four subcategories:

- Acquisitions
- Circulation
- Collection
- Encore

**Development**
The Development module contains tools that assist you with budgeting and selection for your library's collections.

**Balancing**
The Balancing module contains tools that make recommendations for expansion, weeding, or item relocation to achieve an optimal balance within specific library collections (system-wide and by location).

**Maintenance**
The Maintenance module contains tools that make recommendations regarding item deselection and catalog clean-up, based on library-determined criteria.
Module 1: Evaluation (Statistics on Operational Trends)
This module is very similar to the functionality previously available in Reporter. Here is some overview of the four sub-categories.

**Acquisitions:** Allows you to see spending trends by categories such as format, vendors, location, and others. This portion of reporter will only have data if your library uses the Acquisitions module in Sierra.

**Circulation:** Allows you to see circulation and patron statistics by hour, day, month, year, etc. This area allows you to compare data across multiple libraries or look at only your own library’s statistics. You can look at data by transaction location, item location, call number ranges, item types, patron types, transaction type and postal code.

**Collection:** Allows you to track how your collections are growing and shrinking. This area allows you to look at how many items were added by different time breakdowns as well as shows total number of items by various categories such as location, library, and item type. In this category, you can also see a total worth of your collection by item type as well as a turnover history that shows how well different collections circulate.

**Encore:** This area is still in development and does not give many helpful results. We will not be covering this in the class, but you are welcome to play with the different reports in this section.

We will now turn to running some reports that we think will be frequently used by members. By walking through the steps of these sample reports, you will become familiar with the basic steps of generating a report in Decision Center.

**Circulation Reports**
With circulation reports, it is very important to consider first what statistics you are trying to obtain. Do you want to know all items that your patrons circulated, regardless of where (transaction location) they checked something out? Do you want to know all items belonging to your library that circulated, regardless of where they checked out? Or, do you want to know all items that circulated physically at your library, regardless of whether it was to your patrons or they were your items? You can get all three of these numbers in Decision Center.

Note: one caveat is that many renewals in PrairieCat are done via Encore (the OPAC), and are then not credited to an individual library. Your renewal numbers may be lower than in the past because of this. Also, renewals were counted as circulations in Symphony (Sirsi), but are separate transactions in Sierra (Innovative).

**EXAMPLE 1:** How many patrons were added at my library?

1. Choose the module (e.g. Evaluation)
2. Choose the main category (e.g., Circulation)
3. Choose the first filter (e.g., Patrons)
4 Choose the second filter (e.g., Added Patrons by Patron Type)

Note: when you hover over these filters, an explanation of this report displays.

Once you select a category by clicking on it, filters are displayed to indicate your selection criteria. Each report combination has different filters that you can apply to narrow your results.
The most common filters are:

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Transaction Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yesterday</td>
<td>This is the location of the library that owns the item</td>
<td>Circulation</td>
</tr>
<tr>
<td>Week-To-Date</td>
<td>If you want to get a complete count of items circulated at your library, do not limit this filter to your library; otherwise your report will not include items owned by other libraries but circulated at your library.</td>
<td>Checkouts</td>
</tr>
<tr>
<td>Last Week</td>
<td></td>
<td>Renewals</td>
</tr>
<tr>
<td>Month-To-Date</td>
<td></td>
<td>Holds Placed</td>
</tr>
<tr>
<td>Last Month</td>
<td></td>
<td>Holds Filled</td>
</tr>
<tr>
<td>Year-To-Date</td>
<td></td>
<td>Checkins</td>
</tr>
<tr>
<td>Last Year</td>
<td></td>
<td>In-House Use</td>
</tr>
<tr>
<td>Day</td>
<td></td>
<td>Bookings</td>
</tr>
<tr>
<td>Month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quarter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transaction Location</td>
<td>Item Type</td>
<td>Transaction Type</td>
</tr>
<tr>
<td>This is the location where the transaction took place</td>
<td>Home Library</td>
<td></td>
</tr>
<tr>
<td>Patron Type</td>
<td>Item Location</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Documents that provide the full lists of item and patron fixed field values are available on the PrairieCat website at: http://support.prairiecat.info. Login with your L2 login to access documentation on the PrairieCat website. In most of the reports in Decisions Center the values are provided so you can easily make your filter selections. However, the ICode1 field is a numeric value only. Here is the link to the ICode1 list specifically on the PrairieCat website:

https://support.prairiecat.info/documentation/members-only/1022

To limit to your library, click on Edit in the Home Library box. Then scroll through the list and find your library. (Note: there is currently a listing for Juvenile for each library, but since this is used only for scoping in Encore, it will not yield any results when used in Reporter.)
6 Double click on your library on the list, and it will move to the left to the Selected Home Library box.

7 Click on OK and then GO and your report will be generated and displayed:

8 Click the Show Percent Change check box in the upper left corner of the report to show or hide percentages.

9 Click on the Export button in the upper right corner of the report to download your report to Excel. You will be given the option of the current version of Excel, or Excel 2007.

**EXAMPLE 2:** How many items were checked out at my library last month from all libraries?
1 Choose the module (e.g. Evaluation)
2 Choose the main category (e.g., Circulation)
3 Choose the first filter (e.g., Items)

4 Choose the second filter (e.g., Item Type by Transaction Type)

Your choices of filters will appear.

5 Choose a Date (e.g., Last Month)

6 Leave the Location filtered to all libraries.

7 Choose your library as the Transaction Location.
8 Leave the Patron Type as all Patron Types (unless you only want circulation by your patrons)

After saving your filters, Click GO and your report will generate.

EXAMPLE 3: Which reciprocal borrowers are using my library?

*Evaluation > Circulation > Transaction Location > Transaction Location by Home Library*

Date = last month; Location = all; transaction = circulation; patron type = all; item type = all
Find your library on the left axis (transaction location) and you will see all the activity for the specified time period by the patron’s home library. You can export the report to Excel to limit the report down to just your library.

**EXAMPLE 4:** How many of my library’s children’s picture books were checked out at my library yesterday, last week, last month, last year?

*Evaluation > Circulation > Transaction Location > Transaction Location by ICode 1*

This report cannot be limited by icode1; all icode1’s will be displayed.

Date = last month (or yesterday, last week, etc); Location = your library; Transaction = Circulation; Item Type = all Picturebooks are ICode1 1222.

There were 578 Bradley picturebooks circulated at Bradley PL in December 2014. Notice you can see the total number of Bradley picturebooks circulated in PrairieCat in December 2014 in the “All Transaction Locations” row.
Or, another way to find out how many of a certain ICode1 owned by your library circulated anywhere in Prairiecat, but by item type, is:

_Evaluation > Circulation > Items > Item Type by ICode1_  
Date = last month (or yesterday, last week, etc); Location = your library; Transaction = Circulation  
Picturebooks are ICode1 1222. 
There were 629 Bradley PL picturebooks circulated at PrairieCat libraries in December 2014.

**EXAMPLE 5:** See the top 100 items that were checked out/had holds placed, etc. in a particular time period.

_Evaluation > Circulation > Top Titles > Popular Titles_  
To see a list of the top 100 items that had holds placed on them this year by your patrons, select  
Date = year-to-date or last year  
Location = all selected (if you select only your library, you will see only holds placed on your items by your patrons)  
Transaction = holds placed  
Transaction location = all  
Patron type = your patron types  
Item type = all selected (you could also run this report to see the top 100 DVDs that were checked out at your library, the top 100 books, etc.)
You can export this list to Excel. You can also click on a title to see more information about supply and demand for this title:

Or, click on an author to see information on the popularity of their titles:
EXAMPLE 6: See circulation by item type

_Evaluation > Circulation > Items > Item Type by Transaction Type_

Date = last month or last year or range of dates for fiscal year
Location = your library (if you only want materials owned by your library, or All if you want all materials circulated at your library)
Transaction location = your library (if you only want circulation at your library)
Patron type = all (unless you only want circulation by your patrons)
Collection Reports

**EXAMPLE 7:** How many total items are in my collection?

*Evaluation > Collection > Item Trends > Owning Location – Current Items*

Material Type = All

**EXAMPLE 8:** What is the average circulation for each item type in my collection?

*Evaluation > Collection > Turnover > Turnover by Material Type*

Location = your library

Note: the Turnover report is based on when PrairieCat went live on Sierra (July 2012) – in the future it will represent a longer time period
EXAMPLE 9: How many DVDs (or books, or Music CDs) do I own currently in my library?
Evaluation > Collection > Item Trends > Material Type - Current Items
Owning Location = your library

Encore Reports

EXAMPLE 10: See how many patrons are using the OPAC and contributing reviews, ratings, etc.?
Evaluation > Encore > Community Features > Community Features Use Trends
Module 2: Development (Budgeting and Selection)

The Development module contains tools that assist you with budgeting and selection for your library's collections. Here is some overview of the two sub-categories.

**Budget** – these reports allow you to generate a projected budget breakdown by fund, collection or subject. The Budget Projection by Fund report will only work for those libraries that use the Acquisitions module with funds.

**Selection** – these reports allow you to analyze your collection use by holds and circulation to help determine where future budget dollars might be best spent.

**Initial Filters**

You can set the following filters to limit reports in this area:

- **Location** = the branch locations, or individual library buildings, in the PrairieCat database
- **Physical Format** = item types
- **Collection** = item level locations grouped into categories

**Limits** – to enable the budget analysis, you need to include these additional filters:

- **Budget** - The fiscal year budget amount applied to the results
- **Calculate Based on FY Ending** - A prior fiscal year to use as the template for projections. Decision Center uses the specified fiscal year for both the circulations and the expenditures metrics

**EXAMPLE 1:** Am I allocating the correct portion of my total DVD budget to adult collection DVDs versus children's DVDs?

*Development > Budget > Budget Projection by Collection*

Location = your library
Physical format = DVDs, Blu-Rays, VHS
Budget = 20,000 (or, the total amount my library spends on DVDs)
Calculate based on FY ending = 2014 (or whatever your previous fiscal year)

The report analyzes circulation by format and collection, and based on that information suggests the correct budget allocation percentages:
Override (check box)
Check this box to manually enter the amount (Calculated Amount) to be budgeted for the row. When you choose Recalculate, Decision Center adjusts all other recommendations to account for the override.

EXAMPLE 2: Am I allocating the correct portion of my total budget to various areas of my collection (analysis based on call number)?

This report will be more accurate and useful once our project is completed to add additional statistical category tables to our database, particularly for those libraries that choose to use call number prefixes in our approved list for the new statistical tables.

Development > Budget > Budget Projection by Subject
Location = your library
Physical format = all or limit to one or more formats such as books
Collection = all or limit to one or more item level locations that your library uses
Call number range title = Specify a call number index
Budget = the total amount my library spends on whichever format (s) selected
Calculate based on FY ending = 2014 (or whatever your previous fiscal year)
**EXAMPLE 3:** Which authors are most popular with my patrons (based on average monthly circulations over the last 90 days)?

1. **Development** > **Selection** > **Popular Authors**
2. Location = your library
3. Physical format = all or limit to one or more formats such as books
4. Collection = all or limit to one or more categories such as Adult Fiction

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**EXAMPLE 4:** Are there titles that are so popular (based on a user-entered hold wait time) that my library should purchase additional copies? This tool recommends titles that are projected, over the next thirty days, to have a hold wait time longer that the user-entered value.
Development > Selection > Supply and Demand Buying

Location = your library
Physical format = all or limit to one or more formats such as books
Collection = all or limit to one or more categories such as Adult Fiction
Wait Time Greater than = default is 60 days

Remedy Filters
You can apply the following filters to modify the results:

**First Item Created Before** - Limits the results to titles with the first attached item created before the specified date.

**Demand Greater Than** - Limits the results to items with monthly demand greater than the specified number.

**Purchase Amount** - Limits the results to the specified amount as the maximum total expenditure.

**EXAMPLE 5:** Are there titles that are so popular that my library should purchase additional copies? This report recommends purchases based on the number of holds. You first need to choose whether you want the report to analyze current holdings, or titles that are on order but not yet available at the library.

Development > Selection > Hold-to-Item-Ratio Buying

Location = your library
Physical format = all or limit to one or more formats such as books
Collection = all or limit to one or more categories such as Adult Fiction
Hold-To-Item-Ratio = Specify a hold-to-item ratio
Module 3: Balancing (Collection Expansion and Weeding)

Initial Filters
You can set the following filters to limit reports in this area:

**Location** = the branch locations, or individual library buildings, in the PrairieCat database

**Physical Format** = item types

**Collection** = item level locations grouped into categories

**Call Number range** = select one or more ranges of call numbers to limit your results

**EXAMPLE 1**: Are there areas of my collection (evaluation based on call number) that I should expand or weed based on circulation or other performance expectations?

*Balancing > Collection Use > Subject Use*

Location = your library

Physical format = all or limit to one or more formats such as books

Collection = all or limit to one or more categories such as Adult Fiction

Call number range title = Specify a call number index

This report will be more accurate and useful once our project is completed to add additional statistical category tables to our database, for those libraries that choose to use call number prefixes in our approved list for the new statistical tables.

Remedy Filters
You can apply the following filters to modify the results:

**Weed If % Use Less Than** - Limits the results to categories for which the % Titles Circ'd Last 365 Days value is less than the specified percentage.
**Expand If % Use Greater Than** - Limits the results to categories for which the % Titles Circ'd Last 365 Days value is greater than the specified percentage.

**Minimum Number of Titles** - Limits the results to categories containing at least the specified number of titles.

**EXAMPLE 2:** Are there specific call number areas that I should expand or weed based on circulation or other performance expectations?

*Balancing > Collection Use > Subject Use by Location*

Physical format = all or limit to one or more formats such as books
Collection = all or limit to one or more categories such as Adult Fiction
Call number range = Specify one or more ranges
This report doesn't allow for limiting by library, but once the data is exported to Excel, the information can be limited to your library.

This report will be more accurate and useful once our project is completed to add additional statistical category tables to our database, for those libraries that choose to use call number prefixes in our approved list for the new statistical tables.

**EXAMPLE 3:** Can I analyze my title and item circulation by collection and get recommendations to expand or weed each collection based on certain library-determined performance expectations?

*Balancing > Collection Use > Collection Use*

Location = your library
Collection = all or limit to one or more categories such as Adult Fiction
This report doesn't allow for limiting by library, but once the data is exported to Excel, the information can be limited to your library.
EXAMPLE 4: Can I analyze my title and item circulation by collection and get recommendations to expand or weed each collection based on certain library-determined performance expectations?

Balancing > Collection Use > Collection Use by Location
Location = your library
Collection = all or limit to one or more categories such as Adult Fiction

Under the Balancing Module, we have turned off the Floating Management reports because those are only used by libraries using floating collections, and PrairieCat does not use that functionality. Also, there are not currently any reports available under Shelving Allocations (under development).
Module 4: Maintenance (Weeding and Clean-up)

Initial Filters
You can set the following filters to limit reports in this area:

Location = the branch locations, or individual library buildings, in the PrairieCat database

Physical Format = item types

Collection = item level locations grouped into categories

Call Number range = select one or more ranges of call numbers to limit your results

Limits – to refine your weeding criteria, add these additional limits:

  Circs Fewer Than - limits the results to titles with circulations less than the specified value (within the specified timeframe). Titles with circulations equal to or exceeding this value are omitted.

  Within (Months) - the number of months within which the specified circulation quantity applies.

EXAMPLE 1: Which items in my collection might need to be weeded due to low circulation?

Maintenance > Weeding > Low Circulation Weeding

Location = your library

Physical format = all or limit to one or more formats such as books

Collection = all or limit to one or more categories such as Adult Fiction

Call number range = specify one or more ranges

Limits = indicate the minimum number of circulations and the time frame you want to analyze
This report provides specific titles and items, and allows you to download that information to Excel for editing and to take to the shelf for weeding.

**Remedy Filters**

You can apply the following filters to modify the results:

- **Created Before** - Limits the results to records created before the specified date.
- **Last Check-in Date Before** - Limits the results to items last checked in before the specified date.
- **List Price Less Than** - Limits the results to items with a list price lower than the specified amount.
- **Don't Weed Last Copy in Branch** - Omits titles for which there is only one copy in the branch.
- **Don't Weed Last Copy in System** - Omits titles for which there is only one copy in the library system.
- **Number** - The maximum number of rows to include in the results.
- **Shelf Space** - The maximum shelf space allowed before a title is considered for weeding. Shelf space calculations depend upon the **Average Width per Copy** you specify for the associated collection. When you use the **Shelf Space** remedy filter, be sure to enter values of the same unit of measure as your **Average Width per Copy** entries.

**EXAMPLE 2:** Which items in my collection might need to be weeded due to high circulation (poor condition)?

`Maintenance > Weeding > High Circulation Weeding`

Location = your library

Physical format = all or limit to one or more formats such as books

Collection = all or limit to one or more categories such as Adult Fiction

Limits = indicate the total checkouts greater than
The same Remedy Filters are available as in Example 1, to further refine your results. This report provides specific titles and items, and allows you to download that information to Excel for editing and to take to the shelf for weeding.
EXAMPLE 3: Which items in my collection might need to be weeded because they were published before a certain year?

*Maintenance > Weeding > Age of Collection Weeding*
Location = your library
Physical format = all or limit to one or more formats such as books
Collection = all or limit to one or more categories such as Adult Fiction
Call number range = all, or specify one or more ranges
Limits = indicate the years since publication date

![Screenshot of PrairieCat Decision Center](image)

The same Remedy Filters are available as in Example 1, to further refine your results. This report provides specific titles and items, and allows you to download that information to Excel for editing and to take to the shelf for weeding.

EXAMPLE 4: Which items in my collection might need to be weeded because they are no longer needed based on supply and demand?

*Demand* is the number of holds and checkouts (minus holds filled, and not including renewals) over the specified time period. Demand is calculated title by title, not by item.

*Supply* is the potential number of copies that can be checked out per month, incorporating an assessment of the library's historical circulation turnaround time for each item type and location pair. This number includes items on order, but does not include items unavailable for circulation, such as "lost" copies.

*Copies to Weed* - Decision Center recommends weeding copies in excess of 1.5 times the existing demand. The system does not make recommendations to weed titles for which there is a significant hold-to-item ratio. A title's hold queue must be less than 1/4 the total number of items held to qualify for weeding. For example, if there are 100 items for a title, there must be 24 or fewer holds.
Maintenance > Weeding > Supply and Demand Weeding
Location = your library
Physical format = all or limit to one or more formats such as books
Collection = all or limit to one or more categories such as Adult Fiction
Minimum copies to weed = limits the results to titles that meet or exceed the specified number of copies to weed

Remedy Filters
You can apply the following filters to modify the results:

First Item Created Before - limits the results to titles with the first attached item created before the specified date.

Demand/supply Ratio Less Than - limits the results to items below the specified demand-to-supply ratio.

Minimum Copies to Weed - limits the results to titles that meet or exceed the specified number of copies to weed.

Number - the maximum number of rows to include in the results.

This report provides specific titles and items, and allows you to download that information to Excel for editing and to take to the shelf for weeding.

EXAMPLE 5: Which items in my collection are inactive and might be missing?

Maintenance > Clean-up > Missing Items
Location = your library
Physical format = all or limit to one or more formats such as books
Collection = all or limit to one or more categories such as Adult Fiction
Limits – these additional limits can be set:
Weeks on Holdshelf - limits the results to items "on the hold shelf" for the specified minimum number of weeks.

Weeks in Transit - limits the results to items "in transit" for the specified minimum number of weeks.

Months Overdue - limits the results to items overdue for the specified minimum number of months.

**Remedy Filters**
You can apply the following filter to modify the results:

- Number - the maximum number of rows to include in the results.

This report provides specific titles and items, and allows you to download that information to Excel for editing and to take to the shelf.
# HOW DO I?

<table>
<thead>
<tr>
<th>CIRCULATION REPORTS</th>
<th>Report Path</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>See how many patrons were added in a particular month?</strong></td>
<td>Evaluation → Circulation → Patrons → Patron Type-Added.</td>
</tr>
<tr>
<td>If you have multiple locations, you will want to use Circulation → Patrons → Home Library-Added.</td>
<td></td>
</tr>
<tr>
<td><strong>See how many patrons we have currently?</strong></td>
<td>Evaluation → Circulation → Patrons → Patron Type-Current</td>
</tr>
<tr>
<td><strong>See which reciprocal borrowers are using my library?</strong></td>
<td>Evaluation → Circulation → Transaction Location → Home Library</td>
</tr>
<tr>
<td><strong>See what percentage of my patrons used the library yesterday, last week, last month, etc.?</strong></td>
<td>Evaluation → Circulation → Postal Code → Postal Code by Patron Activity.</td>
</tr>
<tr>
<td>If your district has a postal code that overlaps with another library, make sure you select your library as the home library when you run this report.</td>
<td></td>
</tr>
<tr>
<td><strong>See how many items were checked out from all libraries at my library last month?</strong></td>
<td>Evaluation → Circulation → Items → Transaction Type. Limit the owning library to All Libraries and the Transaction Location to Your library.</td>
</tr>
<tr>
<td><strong>See how many items were checked out to my patrons at my library last month?</strong></td>
<td>Evaluation → Circulation → Items → Transaction Type. Limit the owning library to All Libraries, the Transaction Location to Your library, and the Patron Type to your patrons.</td>
</tr>
<tr>
<td><strong>See how many items were checked out to my patrons at all libraries?</strong></td>
<td>Evaluation → Circulation → Items → Transaction Type. Limit the owning library to All Libraries, the Transaction Location to All libraries, and the Patron Type to your patrons.</td>
</tr>
<tr>
<td><strong>See how many of my items were checked out at other libraries last month?</strong></td>
<td>Evaluation → Circulation → Items → Transaction Type. Limit the owning library to your library and the Transaction Location to the library you would like to check.</td>
</tr>
<tr>
<td><strong>See how many of my items were checked out at all libraries last month?</strong></td>
<td>Evaluation → Circulation → Items → Transaction Type. Limit the owning library to your library and the Transaction Location to All libraries.</td>
</tr>
<tr>
<td>Question</td>
<td>Query Details</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| See how many patrons from other libraries checked out items at my library last month? | Evaluation → Circulation → Statistics Group → Patron Type  
Limit the Owning Location to All, Transaction Location to your library, and Transaction to Circulation |
| See how many items did I send to other libraries last month?             | Evaluation → Circulation → Resource Sharing → Item Type  
Limit to Owning Location your library, Transaction Circulation and All but your Patron Types |
| See how many items I received from other libraries last month?           | Evaluation → Circulation → Owning Location → Home Library                                          |
| See how many holds were placed by my patrons?                           | Evaluation → Circulation → Resource Sharing → Item Type  
Limit to Owning Location All, Transaction Holds Placed and your Patron Types |
| See how many holds were filled by my items?                             | Evaluation → Circulation → Resource Sharing → Item Type  
Owning Location limit to your library, Transaction Holds - Filled and All Patron Types |
| See how many holds were filled for my patrons with other libraries’ items? | Evaluation → Circulation → Resource Sharing → Item Type  
Limit to Owning Location all but your library, Transaction Holds Filled and your patron types |
| See how many of my items were renewed last month?                       | Evaluation → Circulation → Items → Transaction Type  
Limit the owning library to your library, the Transaction Type to Renewals and the Transaction Location to All libraries |
| See how many of my patrons renewed items last month?                    | Evaluation → Circulation → Owning Location → Item Library  
Limit to Patron Type your patrons and Transaction to Renewals |
| See what the busiest hours are for circulation?                         | Evaluation → Circulation → Hourly Activity → Day of the Week                                       |
| See how many items circulated by call number range?                    | Evaluation → Circulation → Call Number Range                                                      |

**NOTE:** The call number ranges are still a work in progress and are a combination of Dewey and LC.
| **See how many patrons use my library each month?** | Evaluation → Circulation → Patron → Patron Trends |
| **See how many of my patrons born between 1960-1969 checked out DVDs at my library last month?** | Evaluation → Circulation → Items → Pcode 3 |
| **Get a month-to-month snapshot of my hourly circulation statistics?** | Evaluation → Circulation → Hourly Activity → Hourly Circulation Trends |
| **Get a total number of children’s picture books that were checked out yesterday, last week, last month, last year?** | Evaluation → Circulation → Items → I code 1 This report cannot be limited by icode1; all icode 1’s will be displayed. |
| **See the top 100 items that were checked out/had holds placed, etc. in a particular time period?** | Evaluation → Circulation → Top Titles → Popular Titles To see a list of the top 100 items that had holds placed on them this year, select Date = year-to-date Owning location = all selected (if you select only your library, you will see only holds placed on your items by your patrons) Transaction = holds placed Transaction location = your library Patron type = all selected Item type = all selected (you could also run this report to see the top 100 dvds that were checked out at your library, the top 100 books, etc.) |
| **See circulation by item type? For example, I want to know how many dvds circulated yesterday, last week, last month, etc.?** | Evaluation → Circulation → Items → Transaction Type |
| **See how many holds were filled at my library yesterday, last week, last month, etc.?** | Evaluation → Circulation → Items → Transaction Type |
| **See how many items my patrons borrowed from other libraries yesterday, last week, last month, etc.?** | Evaluation → Circulation → Owning Location → Home Library Locate your library’s row and column and subtract the number at that intersection from the all locations total shown at the top for your library. The result is the number of items borrowed from other libraries. |
| **See how many items we sent to other libraries yesterday, last week, last month, etc.?** | Evaluation → Circulation → Transaction Location → Item Type (can also do Item Code 1) The top line shows the total for all locations, the second line shows the total for your location. Subtract the second line from the first and the |
result is the number of items owned by you and checked out at other libraries.

<table>
<thead>
<tr>
<th>COLLECTION REPORTS</th>
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<tbody>
<tr>
<td><strong>Get a total count of the number of items in my collection?</strong></td>
</tr>
<tr>
<td><strong>See the average circulation for each item type in my collection?</strong></td>
</tr>
<tr>
<td><strong>See how much my collection is worth?</strong></td>
</tr>
<tr>
<td>NOTE: this is a very helpful report for your building and contents insurance.</td>
</tr>
<tr>
<td><strong>See how many DVDs I own currently in my library?</strong></td>
</tr>
<tr>
<td><strong>See how many items of a particular item type were added to my collection?</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ENCORE REPORTS</th>
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<tbody>
<tr>
<td><strong>See how many patrons are using the OPAC? Are they contributing reviews, ratings, etc.?</strong></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>ACQUISITIONS REPORTS</th>
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<tr>
<td><strong>See how much I spent in a certain collection?</strong></td>
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<tr>
<td><strong>See how much did I spend on different formats?</strong></td>
</tr>
<tr>
<td><strong>See how much did I spend with a certain vendor?</strong></td>
</tr>
<tr>
<td><strong>How has my spending changed over the past 6 months?</strong></td>
</tr>
</tbody>
</table>
**Definition List**

**Branch**- This term is used in several locations. It does not mean a Branch Library as we would think of it. Since we are all in the catalog together, each library is a branch. For libraries that have actual branches (eg. Three Rivers, Putnam County, etc), each branch will be listed separately.

**Home Library**- This indicates the home agency of the patron.

**iCode 1**- This is an area we are updating. It will further break down information into more granular statistical categories. For instance, instead of Non-Fiction, you will see 000-099, 100-199, etc.

**iCode 2**- This value is used to discard an item or suppress it from the OPAC.

**Item Type**- This value in the item record is used to govern circulation rules; for PrairieCat the Item Type indicates the format of the item, e.g. Book, DVD, etc.

**Location** - This is the home location of the item, e.g., tcanf = Three Rivers Adult Non-Fiction

**Material Type** - This value in the bibliographic record indicates the form of the item.

**Owning Location**- This indicates the home agency of the item.

**Patron Type**- This value in the patron record is used to govern circulation rules.

**Pcode 1**- This is used to define your level of internet access. NOTE: Some libraries may not use this value.

**Pcode 2**- This is used to define your age and gender. Eg. Adult Female, Juvenile Male

**PCode 3**- Depending on what type of library you are, this is used for either graduating class, decade of birth or homebound, etc.

**Transaction Location**- This value indicates the library where the transaction took place.

**Transaction Type**- This value allows you to limit your statistical report by type of circulation transaction.

**Turnover**- This indicates how often your items circulate based on the total collection. For example, if I have 1,000 DVDs and the turnover rate is 5, that would mean that 5,000 DVDs circulated in the time frame.

For more assistance with PrairieCat reports, please contact the following PrairieCat contract staff:

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